

Steiner & Gelber, P.A.
2201 NW 30th Place, Suite A
Pompano Beach, FL 33069

Richard A Calice Jr & Melissa J Calice
43 Winterberry Court
Cockeysville, MD 21030
|||||||

Steiner & Gelber, P.A.
2201 NW 30th Place, Suite A
Pompano Beach, FL 33069
954-969-8786

September 30, 2012

CONFIDENTIAL

Richard A Calice Jr & Melissa J Calice
43 Winterberry Court
Cockeysville, MD 21030

Dear Richard & Melissa:

We have prepared the following returns from information provided by you without verification or audit:

U.S. Individual Income Tax Return (Form 1040)
Maryland Resident Income Tax Return (Form 502)
Michigan Individual Income Tax Return (Form MI-1040)

We suggest that you examine these returns carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements. Attached are instructions for signing and filing each return. Please follow those instructions carefully.

Also enclosed is any material you furnished for use in preparing the returns. If the returns are examined, requests may be made for supporting documentation. Therefore, we recommend that you retain all pertinent records for at least seven years.

Like all providers of personal financial services, tax professionals are required by law to inform clients of their policies regarding privacy of client information. Our firm continues to adhere to professional standards of confidentiality that are even more stringent than those required by law. We have always protected the security and privacy of your personal and financial information.

Types of Nonpublic Personal Information We Collect

The only nonpublic personal information we collect is provided to us by you or obtained with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures may include providing information to our employees, or, in limited situations, to unrelated third parties who need that information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Clients' Information

We retain records relating to our professional services to better serve your professional needs and, in some cases, to comply with professional guidelines. In order to protect your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

In order that we may properly advise you of tax considerations, please keep us informed of any significant changes in your financial affairs or of any correspondence received from taxing authorities.

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Sincerely,

Steiner & Gelber, P.A.

IRS CIRCULAR 230 DISCLOSURE REQUIREMENT: IRS Circular 230 requires us to notify you that any tax advice contained in this communication (including attachments) is not intended or written to be used, and cannot be used, by any person for the purpose of avoiding tax penalties that may be imposed by law.

Filing Instructions

U.S. Individual Income Tax Declaration for an IRS e-file Return with Electronic Filing Personal Identification Number and Form 1040-V Payment Voucher

Taxable Year Ended December 31, 2011

Name: Richard A Calice Jr & Melissa J Calice

Date Due: October 15, 2012

Remittance: A check in the amount of \$1,377 should be made payable to the United States Treasury and included with the voucher. Write "S.S.N. 383-86-2186, 2011 Form 1040" and your daytime phone number on the check.

Mail To: Internal Revenue Service
P.O. Box 37008
Hartford, CT 06176-0008

Include Form 1040-V with your check.

Signature: Form 8879 IRS e-file Signature Authorization authorizes your electronically filed return to be signed with a Personal Identification Number (PIN) and certifies that Part I amounts are from your tax return. Review and sign the Form 8879 IRS e-file Signature Authorization and mail it as soon as possible to:

Steiner & Gelber, P.A.
2201 NW 30th Place, Suite A
Pompano Beach, FL 33069

Important: Your return will not be filed with the IRS until the signed Form 8879 IRS e-file Signature Authorization Form has been received by this office.

Other: Initial and date the copy of the IRS e-file Signature Authorization and Form 1040, and retain them for your records.

All **client copies** of income tax returns are now being **delivered** to our private, secure web portal for you to retain for your records. Do not submit this copy to the taxing authorities.

To access your web portal go to www.steiner-gelber.com and enter the client portal tab. **You will be prompted to enter your login and password, both which are being provided to you.**

To contact us regarding this message, please call us at 954-969-8786.

If our firm is electronically filing your tax return, by returning the signed Declaration for an IRS e-file Return Form, you acknowledge that you have reviewed your tax return.

Do not attach your payment to Form 1040-V. Instead place them loose in the envelope.

Your return is being filed electronically with the IRS and is not required to be mailed. If you mail a paper copy of Form 1040 to the IRS it will delay processing of your return.

Both taxpayer and spouse should initial and date the return copy.

IRS e-file Signature Authorization

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

U Do not send to the IRS. This is not a tax return.

U Keep this form for your records. See instructions.

2011

Declaration Control Number (DCN)

00656441003932

Taxpayer's name

RICHARD A CALICE JR

Social security number

383-86-2186

Spouse's name

MELISSA J CALICE

Spouse's social security number

376-84-6196

Part I	Tax Return Information — Tax Year Ending December 31, 2011 (Whole Dollars Only)
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1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4)	1	135,534
2	Total tax (Form 1040, line 61; Form 1040A, line 35; Form 1040EZ, line 10)	2	16,701
3	Federal income tax withheld (Form 1040, line 62; Form 1040A, line 36; Form 1040EZ, line 7)	3	8,359
4	Refund (Form 1040, line 74a; Form 1040A, line 43a; Form 1040EZ, line 11; Form 1040-SS, Part I, line 12a)	4	
5	Amount you owe (Form 1040, line 76; Form 1040A, line 45; Form 1040EZ, line 12)	5	1,357

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2011, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). I authorize EFTPS to issue me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To request that my PIN be mailed to me, or to revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize STEINER & GELBER, P.A. to enter or generate my PIN

ERO firm name

as my signature on my tax year 2011 electronically filed income tax return.

62186

Enter five numbers, but
do not enter all zeros

☐ I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature _____ Date 08/31/12

Spouse's PIN: check one box only

☒ I authorize **STEINER & GELBER, P.A.** to enter or generate my PIN

ERO firm name

as my signature on my tax year 2011 electronically filed income tax return.

46196

Enter five numbers, but
do not enter all zeros

☐ I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature _____ Date 08/31/12

Practitioner PIN Method Returns Only—continue below

Part III Certification and Authentication — Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

65644133069

do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2011 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Publication 1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature _____ Date 08/31/12

ERO Must Retain This Form — See Instructions

Do Not Submit This Form to the IRS Unless Requested To Do So

For Paperwork Reduction Act Notice, see your tax return instructions.

DAA

Form **8879** (2011)

Taxpayer Name	<u>RICHARD A</u>	<u>CALICE JR</u>
Spouse Name	<u>MELISSA J</u>	<u>CALICE</u>

DO NOT SUBMIT THIS DOCUMENT TO IRS UNLESS REQUESTED TO DO SO

ERO Declaration

I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer. If the furnished return was signed by a paid preparer, I declare I have entered the paid preparer's identifying information in the appropriate portion of this electronic return. If I am the paid preparer, under the penalties of perjury I declare that I have examined this electronic return, and to the best of my knowledge and belief, it is true, correct, and complete. This declaration is based on all information of which I have any knowledge.

ERO Signature

I am signing this Tax Return by entering my PIN below.

ERO's PIN 65644133069

Taxpayer Declarations

Perjury Statement

Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to IRS and to receive the following information from IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) the reason for any delay in processing or refund; and, c) the date of any refund.

Electronic Funds Withdrawal Consent

If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH Electronic Funds Withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). I authorize EFTPS to issue me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To request that my PIN be mailed to me, or to revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal consent.

I am signing this Tax Return/Form and Electronic Funds Withdrawal Consent, if applicable, by entering my Self-Select PIN below.

Date (all numerics) 08/31/12

Taxpayer's PIN (enter five numbers, other than all zeroes) 62186

Spouse's PIN (enter five numbers, other than all zeroes) 46196

Form 1310 Signature and Verification

Completion of this section indicates that I am requesting a refund of taxes overpaid by or on behalf of the decedent. Under penalties of perjury, I declare that I have examined this Form 1310 claim, and to the best of my knowledge and belief, it is true, correct and complete.

Signature of person claiming refund

Date

2011 Form 1040-VDepartment of the Treasury
Internal Revenue Service**What Is Form 1040-V and Do You Have To Use It?**

It is a statement you send with your check or money order for any balance due on the "Amount you owe" line of your 2011 Form 1040, Form 1040A, or Form 1040EZ. Using Form 1040-V allows us to process your payment more accurately and efficiently. We strongly encourage you to use Form 1040-V, but there is no penalty if you do not.

How To Fill In Form 1040-V

Line 1. Enter your social security number (SSN). If you are filing a joint return, enter the SSN shown first on your return.

Line 2. If you are filing a joint return, enter the SSN shown second on your return.

Line 3. Enter the amount you are paying by check or money order.

Line 4. Enter your name(s) and address exactly as shown on your return. Please print clearly.

How To Prepare Your Payment

- Make your check or money order payable to "United States Treasury." Do not send cash.

- Make sure your name and address appear on your check or money order.
- Enter your daytime phone number and your SSN on your check or money order. If you are filing a joint return, enter the SSN shown first on your return. Also enter "2011 Form 1040," "2011 Form 1040A," or "2011 Form 1040EZ," whichever is appropriate.
- To help us process your payment, enter the amount on the right side of your check like this: \$ XXX.XX. Do not use dashes or lines (for example, do not enter "\$ XXX—" or "\$ XXX XX/100").

How To Send In Your 2011 Tax Return, Payment, and Form 1040-V

- Detach Form 1040-V along the dotted line.
- Do not staple or otherwise attach your payment or Form 1040-V to your return or to each other. Instead, just put them loose in the envelope.
- Mail your 2011 tax return, payment, and Form 1040-V to the address shown on the back that applies to you.

Mail To: Internal Revenue Service

P.O. BOX 37008
HARTFORD, CT 06176-0008

Form **1040-V** (2011)

q Detach Here and Mail With Your Payment and Return q
CUT HERE

Form 1040-V	Department of the Treasury Internal Revenue Service (99)		Payment Voucher		OMB No. 1545-0074		
						2011	
	u Do not staple or attach this voucher to your payment or return.						
	1 Your social security number (SSN)		2 If a joint return, SSN shown second on your return		3 Amount you are paying by check or money order		
	383-86-2186		376-84-6196		Dollars 1,377		
Print or type	4 Your first name and initial RICHARD A				Last name CALICE JR		
	If a joint return, spouse's first name and initial MELISSA J				Last name CALICE		
	Home address (number and street) 43 WINTERBERRY COURT			Apt. no.	City, town or post office, state, and ZIP code (If a foreign address, also complete spaces below.) COCKEYSVILLE MD 21030		
	Foreign country name		Foreign province/country			Foreign postal code	

Form	1040	Department of the Treasury—Internal Revenue Service (99) U.S. Individual Income Tax Return	2011	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.																																																																																																																																																																										
For the year Jan. 1—Dec. 31, 2011, or other tax year beginning				, 2011, ending , 20																																																																																																																																																																											
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City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). COCKEYSVILLE MD 21030				Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse																																																																																																																																																																											
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Attach Schedule C or C-EZ</td> <td></td> <td>12</td> <td style="text-align: right;">28,485</td> </tr> <tr> <td>13</td> <td>Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/></td> <td></td> <td>13</td> <td></td> </tr> <tr> <td>14</td> <td>Other gains or (losses). Attach Form 4797</td> <td></td> <td>14</td> <td></td> </tr> <tr> <td>15a</td> <td>IRA distributions</td> <td>15a 23,190</td> <td>b Taxable amount</td> <td>15b 3,190</td> </tr> <tr> <td>16a</td> <td>Pensions and annuities</td> <td>16a</td> <td>b Taxable amount</td> <td>16b</td> </tr> <tr> <td>17</td> <td>Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E</td> <td></td> <td>17</td> <td></td> </tr> <tr> <td>18</td> <td>Farm income or (loss). 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Tax and Credits

38	Amount from line 37 (adjusted gross income)	38	135,534
39a	Check <input type="checkbox"/> You were born before January 2, 1947, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1947, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here <input type="checkbox"/> 39b		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	17,621
41	Subtract line 40 from line 38	41	117,913
42	Exemptions. Multiply \$3,700 by the number on line 6d	42	14,800
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	103,113
44	Tax (see instr.). Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/> 962 elec.	44	18,028
45	Alternative minimum tax (see instructions). Attach Form 6251	45	
46	Add lines 44 and 45	46	18,028

Standard Deduction for—

• People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.

• All others:
Single or Married filing separately, \$5,800
Married filing jointly or Qualifying widow(er), \$11,600
Head of household, \$8,500

Other Taxes

47	Foreign tax credit. Attach Form 1116 if required	47	
48	Credit for child and dependent care expenses. Attach Form 2441	48	500
49	Education credits from Form 8863, line 23	49	1,209
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit (see instructions)	51	700
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	
54	Add lines 47 through 53. These are your total credits	54	2,409
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	15,619
56	Self-employment tax. Attach Schedule SE	56	763
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	319
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Other taxes. Enter code(s) from instructions	60	
61	Add lines 55 through 60. This is your total tax	61	16,701

Payments

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	8,359
63	2011 estimated tax payments and amount applied from 2010 return	63	
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election 64b		
65	Additional child tax credit. Attach Form 8812	65	
66	American opportunity credit from Form 8863, line 14	66	806
67	First-time homebuyer credit from Form 5405, line 10	67	
68	Amount paid with request for extension to file	68	6,250
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> 8839 c <input type="checkbox"/> 8801 d <input type="checkbox"/> 8885	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	15,415

Refund

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	
74a	Amount of line 73 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	74a	
b	Routing number <input type="text"/>	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number <input type="text"/>		
75	Amount of line 73 you want applied to your 2012 estimated tax	75	

Amount You Owe

76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions	76	1,357
77	Estimated tax penalty (see instructions)	77	

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☒ **Yes.** Complete below. ☐ **No**

Designee's name **CLIFFORD S. GELBER, CPA** Personal identification number (PIN) **33069**

Phone no. **954-969-8786**

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	Your signature <input type="text"/>		Date <input type="text"/>	Your occupation BUSINESS ANALYST	Daytime phone number 248-506-2138
Spouse's signature. If a joint return, both must sign.	Spouse's signature <input type="text"/>		Date <input type="text"/>	Spouse's occupation HOMEMAKER	If the IRS sent you an Identity Protection PIN, enter it here (see instr.) <input type="text"/>

Print/Type preparer's name CLIFFORD S. GELBER, CPA	Preparer's signature <input type="text"/>	Date <input type="text"/>	Check <input type="checkbox"/> if self-employed	PTIN P00747918
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Paid

Preparer Firm's name **STEINER & GELBER, P.A.** Firm's EIN **65-0365240**

Use Only Firm's address **2201 NW 30TH PLACE, SUITE A POMPANO BEACH FL 33069** Phone no. **954-969-8786**

10/15 INT 20 TOT 1,377 Form 1040 (2011)

**SCHEDULE A
(Form 1040)**Department of the Treasury
Internal Revenue Service

(99)

Itemized Deductions▶ **Attach to Form 1040.**▶ **See Instructions for Schedule A (Form 1040).**

OMB No. 1545-0074

2011Attachment
Sequence No.**07**

Name(s) shown on Form 1040

RICHARD A CALICE JR & MELISSA J CALICE

Your social security number

383-86-2186

Medical**and
Dental
Expenses****Caution.** Do not include expenses reimbursed or paid by others.

- 1 Medical and dental expenses (see instructions) **1**
- 2 Enter amount from Form 1040, line 38 **2** **2**
- 3 Multiply line 2 by 7.5% (.075) **3**
- 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- **4**

**Taxes You
Paid**

- 5 State and local (check only one box):

- a ☒ Income taxes, or
- b ☐ General sales taxes }

- 6 Real estate taxes (see instructions) **6** 3,126
- 7 Personal property taxes **7** 2,677
- 8 Other taxes. List type and amount ▶ **8**

- 9 Add lines 5 through 8
- 9**
- 5,803

**Interest
You Paid****Note.**Your mortgage
interest
deduction may
be limited (see
instructions).

- 10 Home mortgage interest and points reported to you on Form 1098 **10** 11,818
- 11 Home mortgage interest not reported to you on Form 1098. If paid to the
person from whom you bought the home, see instructions and show that
person's name, identifying no., and address ▶ **11**
- 12 Points not reported to you on Form 1098. See instructions for
special rules **12**
- 13 Mortgage insurance premiums (see instructions) **13**
- 14 Investment interest. Attach Form 4952 if required. (See
instructions.) **14**
- 15 Add lines 10 through 14 **15** 11,818

**Gifts to
Charity**If you made a
gift and got a
benefit for it,
see instructions.

- 16 Gifts by cash or check. If you made any gift of \$250 or more,
see instructions **16**
- 17 Other than by cash or check. If any gift of \$250 or more, see
instructions. You **must** attach Form 8283 if over \$500 **17**
- 18 Carryover from prior year **18**
- 19 Add lines 16 through 18 **19**

**Casualty and
Theft Losses**

- 20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)
- 20**

**Job Expenses
and Certain
Miscellaneous
Deductions**

- 21 Unreimbursed employee expenses—job travel, union dues,
job education, etc. Attach Form 2106 or 2106-EZ if required.
(See instructions.) ▶ **21**
- 22 Tax preparation fees **22**
- 23 Other expenses—investment, safe deposit box, etc. List type
and amount ▶ **23**
- 24 Add lines 21 through 23 **24**
- 25 Enter amount from Form 1040, line 38 **25** **25**
- 26 Multiply line 25 by 2% (.02) **26**
- 27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0- **27**

**Other
Miscellaneous
Deductions**

- 28 Other—from list in instructions. List type and amount ▶
- 28**

**Total
Itemized
Deductions**

- 29 Add the amounts in the far right column for lines 4 through 28. Also, enter this amount
on Form 1040, line 40 **29** 17,621
- 30 If you elect to itemize deductions even though they are less than your standard
deduction, check here ☐

For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule A (Form 1040) 2011

SCHEDULE C
(Form 1040)**Profit or Loss From Business**

(Sole Proprietorship)

OMB No. 1545-0074

2011Attachment
Sequence No.**09**Department of the Treasury
Internal Revenue Service

(99)

For information on Schedule C and its instructions, go to www.irs.gov/schedulec

Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.

Name of proprietor

RICHARD A CALICE JR

Social security number (SSN)

383-86-2186

A Principal business or profession, including product or service (see instructions)

SOFTWARE CONSULTANT

B Enter code from instructions

541990

C Business name. If no separate business name, leave blank.

CALICE CONSULTING SERVICE LLC

D Employer ID number (EIN), (see instr.)

26-4748328

E Business address (including suite or room no.) 43 WINTERBERRY COURT

City, town or post office, state, and ZIP code COCKEYSVILLE MD 21030

F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ☐**G** Did you "materially participate" in the operation of this business during 2011? If "No," see instructions for limit on losses ☒ Yes ☐ No**H** If you started or acquired this business during 2011, check here ☐**I** Did you make any payments in 2011 that would require you to file Form(s) 1099? (see instructions) ☐ Yes ☒ No**J** If "Yes," did you or will you file all required Forms 1099? ☐ Yes ☐ No**Part I Income****1a** Merchant card and third party payments. For 2011, enter -0-

1a

0

b Gross receipts or sales not entered on line 1a (see instructions)

1b

63,797

c Income reported to you on Form W-2 if the "Statutory Employee" box on that form was checked. **Caution.** See instr. before completing this line

1c

d Total gross receipts. Add lines 1a through 1c

1d

63,797

2 Returns and allowances plus any other adjustments (see instructions)

2

3 Subtract line 2 from line 1d

3

63,797

4 Cost of goods sold (from line 42)

4

5 Gross profit. Subtract line 4 from line 3

5

63,797

6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)

6

7 Gross income. Add lines 5 and 6

7

63,797

Part II Expenses

Enter expenses for business use of your home only on line 30.

8 Advertising

8

9 Car and truck expenses (see instructions)

9

3,651

10 Commissions and fees

10

11 Contract labor (see instructions)

11

12 Depletion

12

13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions)

13

976

14 Employee benefit programs (other than on line 19)

14

15 Insurance (other than health)

15

16 Interest:**a** Mortgage (paid to banks, etc.)

16a

b Other

16b

17 Legal and professional services

17

18 Office expense (see instructions)

18

19 Pension and profit-sharing plans

19

20 Rent or lease (see instructions):

20

a Vehicles, machinery, and equipment

20a

b Other business property

20b

12,150

21 Repairs and maintenance

21

22 Supplies (not included in Part III)

22

23 Taxes and licenses

23

24 Travel, meals, and entertainment:

24

a Travel

24a

16,015

b Deductible meals and entertainment (see instructions)

24b

1,800

25 Utilities

25

26 Wages (less employment credits)

26

27a Other expenses (from line 48)

27a

720

b Reserved for future use

27b

28 Total expenses before expenses for business use of home. Add lines 8 through 27a

28

35,312

29 Tentative profit or (loss). Subtract line 28 from line 7

29

28,485

30 Expenses for business use of your home. Attach **Form 8829**. Do not report such expenses elsewhere

30

31 Net profit or (loss). Subtract line 30 from line 29.

31

28,485

• If a profit, enter on both **Form 1040, line 12** (or **Form 1040NR, line 13**) and on **Schedule SE, line 2**.If you entered an amount on line 1c, see instr. Estates and trusts, enter on **Form 1041, line 3**.• If a loss, you **must** go to line 32.**32** If you have a loss, check the box that describes your investment in this activity (see instructions).• If you checked 32a, enter the loss on both **Form 1040, line 12**, (or **Form 1040NR, line 13**) and on **Schedule SE, line 2**.If you entered an amount on line 1c, see the instructions for line 31. Estates and trusts, enter on **Form 1041, line 3**.• If you checked 32b, you **must** attach **Form 6198**. Your loss may be limited.

32a

☐

All investment is at risk.

32b

☐

Some investment is not at risk.

For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule C (Form 1040) 2011

RICHARD A CALICE JR

383-86-2186

Schedule C (Form 1040) 2011 SOFTWARE CONSULTANT

Page 2

Part III	Cost of Goods Sold (see instructions)
-----------------	--

33 Method(s) used to value closing inventory: **a** ☐ Cost **b** ☐ Lower of cost or market **c** ☐ Other (attach explanation)

34 Was there any change in determining quantities, costs, or valuations between opening and closing inventory?
If "Yes," attach explanation ☐ Yes ☐ No

35 Inventory at beginning of year. If different from last year's closing inventory, attach explanation	35	
36 Purchases less cost of items withdrawn for personal use	36	
37 Cost of labor. Do not include any amounts paid to yourself	37	
38 Materials and supplies	38	
39 Other costs	39	
40 Add lines 35 through 39	40	
41 Inventory at end of year	41	
42 Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4	42	

Part IV Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 9 and are not required to file Form 4562 for this business. See the instructions for line 13 to find out if you must file Form 4562.

43 When did you place your vehicle in service for business purposes? (month, day, year) **U**

44 Of the total number of miles you drove your vehicle during 2011, enter the number of miles you used your vehicle for:

a Business **b** Commuting (see instructions) **c** Other

45 Was your vehicle available for personal use during off-duty hours? ☐ **Yes** ☐ **No**

46 Do you (or your spouse) have another vehicle available for personal use? ☐ **Yes** ☐ **No**

47a Do you have evidence to support your deduction? ☐ **Yes** ☐ **No**

b If "Yes," is the evidence written? ☐ **Yes** ☐ **No**

Part V	Other Expenses. List below business expenses not included on lines 8-26 or line 30.
---------------	--

[illegible]

Name of person with **self-employment** income (as shown on Form 1040)

Social security number of person

with **self-employment** income **U****383-86-2186****Section B—Long Schedule SE****Part I Self-Employment Tax****Note.** If your only income subject to self-employment tax is **church employee income**, see instructions. Also see instructions for the definition of church employee income.**A** If you are a minister, member of a religious order, or Christian Science practitioner **and** you filed Form 4361, but you had \$400 or more of **other** net earnings from self-employment, check here and continue with Part I **U** ☐**1a** Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. **Note.** Skip lines 1a and 1b if you use the farm optional method (see instructions)**1a****b** If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Y**1b** ()**2** Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1.**2** 28,485Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report. **Note.** Skip this line if you use the nonfarm optional method (see instructions)**3** Combine lines 1a, 1b, and 2**3** 28,485**4a** If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3**4a** 26,306**Note.** If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.**b** If you elect one or both of the optional methods, enter the total of lines 15 and 17 here**4b****c** Combine lines 4a and 4b. If less than \$400, **stop**; you do not owe self-employment tax.**4c** 26,306**Exception.** If less than \$400 and you had **church employee income**, enter -0- and continue **U****5a** Enter your **church employee income** from Form W-2. See instructions for definition of church employee income**5a****b** Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-**5b** 0**6** Add lines 4c and 5b**6** 26,306**7** Maximum amount of combined wages and self-employment earnings subject to social security tax or the 4.2% portion of the 5.65% railroad retirement (tier 1) tax for 2011**7** 106,800**8a** Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation.

If \$106,800 or more, skip lines 8b through 10, and go to line 11

8a 106,800**b** Unreported tips subject to social security tax (from Form 4137, line 10)**8b****c** Wages subject to social security tax (from Form 8919, line 10)**8c****d** Add lines 8a, 8b, and 8c**8d****9** Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 **U****9****10** Multiply the **smaller** of line 6 or line 9 by 10.4% (.104)**10****11** Multiply line 6 by 2.9% (.029)**11** 763**12** **Self-employment tax.** Add lines 10 and 11. Enter here and on Form 1040, line 56, or Form 1040NR, line 54**12** 763**13** **Deduction for employer-equivalent portion of self-employment tax.** Add the two following amounts.

• 59.6% (.596) of line 10.

• One-half of line 11.

Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27

13

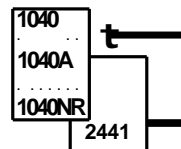
382

Part II Optional Methods To Figure Net Earnings (see instructions)**Farm Optional Method.** You may use this method **only** if (a) your gross farm income¹ was not more than \$6,720, or (b) your net farm profits² were less than \$4,851.**14** Maximum income for optional methods**14** 4,480**15** Enter the **smaller** of: two-thirds (2/3) of gross farm income¹ (not less than zero) or \$4,480. Also include this amount on line 4b above**15****Nonfarm Optional Method.** You may use this method **only** if (a) your net nonfarm profits³ were less than \$4,851 and also less than 72.189% of your gross nonfarm income,⁴ and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. **Caution.** You may use this method no more than five times.**16** Subtract line 15 from line 14**16****17** Enter the **smaller** of: two-thirds (2/3) of gross nonfarm income⁴ (not less than zero) or the amount on line 16. Also include this amount on line 4b above**17**¹ From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.² From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A—minus the amount you would have entered on line 1b had you not used the optional method.³ From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.⁴ From Sch. C, line 7; Sch. C-EZ, line 1d; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

Form **2441****Child and Dependent Care Expenses**Department of the Treasury
Internal Revenue Service (99)

U Attach to Form 1040, Form 1040A, or Form 1040NR.

U See separate instructions.



OMB No. 1545-0074

2011Attachment
Sequence No. **21**

Name(s) shown on return

Your social security number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

Part I Persons or Organizations Who Provided the Care—You must complete this part.

(If you have more than two care providers, see the instructions.)

1	(a) Care provider's name	(b) Address (number, street, apt. no., city, state, and ZIP code)	(c) Identifying number (SSN or EIN)	(d) Amount paid (see instructions)
	ST. DENNIS CHILD DEVEL	1415 N STEPHENSON HWY ROYAL OAK, MI 48607	TAX-EXEMPT 38-2878940	6,284
	ST. PAUL'S LUTHERAN	1609 KURTZ AVE LUTHERVILLE, MD 21093	TAX-EXEMPT 52-0670119	2,057

Did you receive
dependent care benefits?

No

Yes

U Complete only Part II below.

U Complete Part III on the back next.

Caution. If the care was provided in your home, you may owe employment taxes. If you do, you cannot file Form 1040A. For details, see the instructions for Form 1040, line 59a, or Form 1040NR, line 58a.**Part II Credit for Child and Dependent Care Expenses****2** Information about your **qualifying person(s)**. If you have more than two qualifying persons, see the instructions.

(a) Qualifying person's name		(b) Qualifying person's social security number	(c) Qualified expenses you incurred and paid in 2011 for the person listed in column (a)
First	Last		
ROCCO	CALICE	377-33-5654	4,171
AMELIA	CALICE	376-35-6233	4,170

3 Add the amounts in column (c) of line 2. **Do not** enter more than \$3,000 for one qualifying person or \$6,000 for two or more persons. If you completed Part III, enter the amount from line 31

3 6,000

4 Enter your **earned income**. See instructions

4 137,529

5 If married filing jointly, enter your spouse's earned income (if your spouse was a student or was disabled, see the instructions); **all others**, enter the amount from line 4

5 2,500

6 Enter the **smallest** of line 3, 4, or 5

6 2,500

7 Enter the amount from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37

7 135,534

8 Enter on line 8 the decimal amount shown below that applies to the amount on line 7

If line 7 is:

Over	But not over	Decimal amount is
------	--------------	-------------------

\$0—15,000	.35
15,000—17,000	.34
17,000—19,000	.33
19,000—21,000	.32
21,000—23,000	.31
23,000—25,000	.30
25,000—27,000	.29
27,000—29,000	.28

If line 7 is:

Over	But not over	Decimal amount is
------	--------------	-------------------

\$29,000—31,000	.27
31,000—33,000	.26
33,000—35,000	.25
35,000—37,000	.24
37,000—39,000	.23
39,000—41,000	.22
41,000—43,000	.21
43,000—No limit	.20

8 X .20

9 Multiply line 6 by the decimal amount on line 8. If you paid 2010 expenses in 2011, see the instructions

9 500

10 Tax liability limit. Enter the amount from the Credit

Limit Worksheet in the instructions

10 18,028

11 **Credit for child and dependent care expenses.** Enter the **smaller** of line 9 or line 10

here and on Form 1040, line 48; Form 1040A, line 29; or Form 1040NR, line 46

11 500

For Paperwork Reduction Act Notice, see your tax return instructions.Form **2441** (2011)

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

Form 2441 (2011)

Page 2

Part III Dependent Care Benefits

12 Enter the total amount of dependent care benefits you received in 2011. Amounts you received as an employee should be shown in box 10 of your Form(s) W-2. Do not include amounts reported as wages in box 1 of Form(s) W-2. If you were self-employed or a partner, include amounts you received under a dependent care assistance program from your sole proprietorship or partnership	12	5,000
13 Enter the amount, if any, you carried over from 2010 and used in 2011 during the grace period. See instructions	13	
14 Enter the amount, if any, you forfeited or carried forward to 2012. See instructions	14	()
15 Combine lines 12 through 14. See instructions	15	5,000
16 Enter the total amount of qualified expenses incurred in 2011 for the care of the qualifying person(s)	16	8,341
17 Enter the smaller of line 15 or 16	17	5,000
18 Enter your earned income . See instructions	18	132,529
19 Enter the amount shown below that applies to you. <ul style="list-style-type: none"> • If married filing jointly, enter your spouse's earned income (if your spouse was a student or was disabled, see the instructions for line 5). • If married filing separately, see instructions. • All others, enter the amount from line 18. 	19	
20 Enter the smallest of line 17, 18, or 19	20	
21 Enter \$5,000 (\$2,500 if married filing separately and you were required to enter your spouse's earned income on line 19)	21	5,000
22 Is any amount on line 12 from your sole proprietorship or partnership? (Form 1040A filers go to line 25.) <input checked="" type="checkbox"/> No. Enter -0-. <input type="checkbox"/> Yes. Enter the amount here	22	0
23 Subtract line 22 from line 15	23	5,000
24 Deductible benefits. Enter the smallest of line 20, 21, or 22. Also, include this amount on the appropriate line(s) of your return. See instructions	24	
25 Excluded benefits. Form 1040 and 1040NR filers: If you checked "No" on line 22, enter the smaller of line 20 or 21. Otherwise, subtract line 24 from the smaller of line 20 or line 21. If zero or less, enter -0-. Form 1040A filers: Enter the smaller of line 20 or line 21	25	0
26 Taxable benefits. Form 1040 and 1040NR filers: Subtract line 25 from line 23. If zero or less, enter -0-. Also, include this amount on Form 1040, line 7; or Form 1040NR, line 8. On the dotted line next to Form 1040, line 7; or Form 1040NR, line 8, enter "DCB." Form 1040A filers: Subtract line 25 from line 15. Also, include this amount on Form 1040A, line 7. In the space to the left of line 7, enter "DCB"	26	5,000

To claim the child and dependent care credit, complete lines 27 through 31 below.

27 Enter \$3,000 (\$6,000 if two or more qualifying persons)	27	6,000
28 Form 1040 and 1040NR filers: Add lines 24 and 25. Form 1040A filers: Enter the amount from line 25	28	
29 Subtract line 28 from line 27. If zero or less, stop . You cannot take the credit. Exception. If you paid 2010 expenses in 2011, see the instructions for line 9	29	6,000
30 Complete line 2 on the front of this form. Do not include in column (c) any benefits shown on line 28 above. Then, add the amounts in column (c) and enter the total here	30	8,341
31 Enter the smaller of line 29 or 30. Also, enter this amount on line 3 on the front of this form and complete lines 4 through 11	31	6,000

Form **2441** (2011)

Form

5329Department of the Treasury
Internal Revenue Service (99)**Additional Taxes on Qualified Plans
(Including IRAs) and Other Tax-Favored Accounts**

U Attach to Form 1040 or Form 1040NR.

U See separate instructions.

OMB No. 1545-0074

2011Attachment
Sequence No. **29**

Name of individual subject to additional tax. If married filing jointly, see instructions.

Your social security number

RICHARD A

CALICE JR

383-86-2186

**Fill in Your Address Only
If You Are Filing This
Form by Itself and Not
With Your Tax Return**

Home address (number and street), or P.O. box if mail is not delivered to your home

Apt. no.

City, town or post office, state, and ZIP code

If this is an amended
return, check here ☐If you **only** owe the additional 10% tax on early distributions, you may be able to report this tax directly on Form 1040, line 58, or Form 1040NR, line 56, without filing Form 5329. See the instructions for Form 1040, line 58, or for Form 1040NR, line 56.**Part I Additional Tax on Early Distributions**

Complete this part if you took a taxable distribution before you reached age 59½ from a qualified retirement plan (including an IRA) or modified endowment contract (unless you are reporting this tax directly on Form 1040 or Form 1040NR—see above). You may also have to complete this part to indicate that you qualify for an exception to the additional tax on early distributions or for certain Roth IRA distributions (see instructions).

1	Early distributions included in income. For Roth IRA distributions, see instructions	1	1,873
2	Early distributions included on line 1 that are not subject to the additional tax (see instructions). Enter the appropriate exception number from the instructions: _____	2	
3	Amount subject to additional tax. Subtract line 2 from line 1	3	1,873
4	Additional tax. Enter 10% (.10) of line 3. Include this amount on Form 1040, line 58, or Form 1040NR, line 56	4	187
Caution: If any part of the amount on line 3 was a distribution from a SIMPLE IRA, you may have to include 25% of that amount on line 4 instead of 10% (see instructions).			

Part II Additional Tax on Certain Distributions From Education Accounts

Complete this part if you included an amount in income, on Form 1040 or Form 1040NR, line 21, from a Coverdell education savings account (ESA) or a qualified tuition program (QTP).

5	Distributions included in income from Coverdell ESAs and QTPs	5	
6	Distributions included on line 5 that are not subject to the additional tax (see instructions)	6	
7	Amount subject to additional tax. Subtract line 6 from line 5	7	
8	Additional tax. Enter 10% (.10) of line 7. Include this amount on Form 1040, line 58, or Form 1040NR, line 56	8	

Part III Additional Tax on Excess Contributions to Traditional IRAs

Complete this part if you contributed more to your traditional IRAs for 2011 than is allowable or you had an amount on line 17 of your 2010 Form 5329.

9	Enter your excess contributions from line 16 of your 2010 Form 5329 (see instructions). If zero, go to line 15	9	
10	If your traditional IRA contributions for 2011 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	10	
11	2011 traditional IRA distributions included in income (see instructions)	11	
12	2011 distributions of prior year excess contributions (see instructions)	12	
13	Add lines 10, 11, and 12	13	
14	Prior year excess contributions. Subtract line 13 from line 9. If zero or less, enter -0-	14	
15	Excess contributions for 2011 (see instructions)	15	
16	Total excess contributions. Add lines 14 and 15	16	
17	Additional tax. Enter 6% (.06) of the smaller of line 16 or the value of your traditional IRAs on December 31, 2011 (including 2011 contributions made in 2012). Include this amount on Form 1040, line 58, or Form 1040NR, line 56	17	

Part IV Additional Tax on Excess Contributions to Roth IRAs

Complete this part if you contributed more to your Roth IRAs for 2011 than is allowable or you had an amount on line 25 of your 2010 Form 5329.

18	Enter your excess contributions from line 24 of your 2010 Form 5329 (see instructions). If zero, go to line 23	18	
19	If your Roth IRA contributions for 2011 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	19	
20	2011 distributions from your Roth IRAs (see instructions)	20	
21	Add lines 19 and 20	21	
22	Prior year excess contributions. Subtract line 21 from line 18. If zero or less, enter -0-	22	
23	Excess contributions for 2011 (see instructions)	23	
24	Total excess contributions. Add lines 22 and 23	24	
25	Additional tax. Enter 6% (.06) of the smaller of line 24 or the value of your Roth IRAs on December 31, 2011 (including 2011 contributions made in 2012). Include this amount on Form 1040, line 58, or Form 1040NR, line 56	25	

For Privacy Act and Paperwork Reduction Act Notice, see your tax return instructions.

DAA

Form **5329** (2011)

Form **5329**Department of the Treasury
Internal Revenue Service (99)**Additional Taxes on Qualified Plans
(Including IRAs) and Other Tax-Favored Accounts**

U Attach to Form 1040 or Form 1040NR.

U See separate instructions.

OMB No. 1545-0074

2011Attachment
Sequence No. **29**

Name of individual subject to additional tax. If married filing jointly, see instructions.

Your social security number

MELISSA J

CALICE

376-84-6196

**Fill in Your Address Only
If You Are Filing This
Form by Itself and Not
With Your Tax Return**

Home address (number and street), or P.O. box if mail is not delivered to your home

Apt. no.

City, town or post office, state, and ZIP code

If this is an amended
return, check here ☐If you **only** owe the additional 10% tax on early distributions, you may be able to report this tax directly on Form 1040, line 58, or Form 1040NR, line 56, without filing Form 5329. See the instructions for Form 1040, line 58, or for Form 1040NR, line 56.**Part I Additional Tax on Early Distributions**

Complete this part if you took a taxable distribution before you reached age 59½ from a qualified retirement plan (including an IRA) or modified endowment contract (unless you are reporting this tax directly on Form 1040 or Form 1040NR—see above). You may also have to complete this part to indicate that you qualify for an exception to the additional tax on early distributions or for certain Roth IRA distributions (see instructions).

1	Early distributions included in income. For Roth IRA distributions, see instructions	1	1,317
2	Early distributions included on line 1 that are not subject to the additional tax (see instructions). Enter the appropriate exception number from the instructions: _____	2	
3	Amount subject to additional tax. Subtract line 2 from line 1	3	1,317
4	Additional tax. Enter 10% (.10) of line 3. Include this amount on Form 1040, line 58, or Form 1040NR, line 56	4	132
Caution: If any part of the amount on line 3 was a distribution from a SIMPLE IRA, you may have to include 25% of that amount on line 4 instead of 10% (see instructions).			

Part II Additional Tax on Certain Distributions From Education Accounts

Complete this part if you included an amount in income, on Form 1040 or Form 1040NR, line 21, from a Coverdell education savings account (ESA) or a qualified tuition program (QTP).

5	Distributions included in income from Coverdell ESAs and QTPs	5	
6	Distributions included on line 5 that are not subject to the additional tax (see instructions)	6	
7	Amount subject to additional tax. Subtract line 6 from line 5	7	
8	Additional tax. Enter 10% (.10) of line 7. Include this amount on Form 1040, line 58, or Form 1040NR, line 56	8	

Part III Additional Tax on Excess Contributions to Traditional IRAs

Complete this part if you contributed more to your traditional IRAs for 2011 than is allowable or you had an amount on line 17 of your 2010 Form 5329.

9	Enter your excess contributions from line 16 of your 2010 Form 5329 (see instructions). If zero, go to line 15	9	
10	If your traditional IRA contributions for 2011 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	10	
11	2011 traditional IRA distributions included in income (see instructions)	11	
12	2011 distributions of prior year excess contributions (see instructions)	12	
13	Add lines 10, 11, and 12	13	
14	Prior year excess contributions. Subtract line 13 from line 9. If zero or less, enter -0-	14	
15	Excess contributions for 2011 (see instructions)	15	
16	Total excess contributions. Add lines 14 and 15	16	
17	Additional tax. Enter 6% (.06) of the smaller of line 16 or the value of your traditional IRAs on December 31, 2011 (including 2011 contributions made in 2012). Include this amount on Form 1040, line 58, or Form 1040NR, line 56	17	

Part IV Additional Tax on Excess Contributions to Roth IRAs

Complete this part if you contributed more to your Roth IRAs for 2011 than is allowable or you had an amount on line 25 of your 2010 Form 5329.

18	Enter your excess contributions from line 24 of your 2010 Form 5329 (see instructions). If zero, go to line 23	18	
19	If your Roth IRA contributions for 2011 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	19	
20	2011 distributions from your Roth IRAs (see instructions)	20	
21	Add lines 19 and 20	21	
22	Prior year excess contributions. Subtract line 21 from line 18. If zero or less, enter -0-	22	
23	Excess contributions for 2011 (see instructions)	23	
24	Total excess contributions. Add lines 22 and 23	24	
25	Additional tax. Enter 6% (.06) of the smaller of line 24 or the value of your Roth IRAs on December 31, 2011 (including 2011 contributions made in 2012). Include this amount on Form 1040, line 58, or Form 1040NR, line 56	25	

For Privacy Act and Paperwork Reduction Act Notice, see your tax return instructions.

DAA

Form **5329** (2011)

Form **8606**Department of the Treasury
Internal Revenue Service (99)**Nondeductible IRAs**

See separate instructions.

Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-0074

2011Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file Form 8606. See instructions.

RICHARD A

CALICE JR

Your social security number

383-86-2186

**Fill in Your Address Only
If You Are Filing This
Form by Itself and Not
With Your Tax Return**

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2011.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2011 **and** you made nondeductible contributions to a traditional IRA in 2011 or an earlier year. For this purpose, a distribution does not include a rollover, qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011 (excluding any portion you recharacterized) **and** you made nondeductible contributions to a traditional IRA in 2011 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2011, including those made for 2011 from January 1, 2012, through April 17, 2012 (see instructions)	1	
2	Enter your total basis in traditional IRAs (see instructions)	2	
3	Add lines 1 and 2	3	
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> In 2011, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? </div> <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> <p>No <input type="checkbox"/> Enter the amount from line 3 on line 14. Do not complete the rest of Part I.</p> <p>Yes <input type="checkbox"/> Go to line 4.</p> </div>			
4	Enter those contributions included on line 1 that were made from January 1, 2012, through April 17, 2012	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2011, plus any outstanding rollovers (see instructions)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2011. Do not include rollovers, qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011. Do not include amounts converted that you later recharacterized (see instructions). Also enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2011 and earlier years	14	
15	Taxable amount. Subtract line 12 from line 7. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b Note: You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59½ at the time of the distribution (see instructions).	15	

Part II 2011 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2011 (excluding any portion you recharacterized).

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011. Do not include amounts you later recharacterized back to traditional, SEP, or SIMPLE IRAs in 2011 or 2012 (see instructions)	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	Taxable amount. Subtract line 17 from line 16. Also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	18	

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form **8606** (2011)

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2011. For this purpose, a distribution does not include a rollover, a qualified charitable distribution, a one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2011, including any qualified first-time homebuyer distributions and certain qualified distributions (see instructions)	19	17,873
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-, skip lines 22 through 24, and enter -0- on line 25	21	17,873
22	Enter your basis in Roth IRA contributions (see instructions)	22	16,000
23	Subtract line 22 from line 21. If zero or less, enter -0-, skip line 24, and enter -0- on line 25. If more than zero, you may be subject to an additional tax (see instructions)	23	1,873
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA (see instructions)	24	
25	Subtract line 24 from line 23. If zero or less, enter -0- and see the Note below. Note. If you completed lines 20a and 20b or 25a and 25b of your 2010 Form 8606, go to line 26 (see instructions). Otherwise, skip lines 26 through 35 and go to line 36.	25	1,873
26	Enter the total of lines 20a, 20b, 25a, and 25b from your 2010 Form 8606. (If zero, see the note above)	26	
27	Enter the smaller of line 23 or line 24	27	
28	Enter the portion of line 24, if any, that was converted before 2010 (see instructions)	28	
29	Subtract line 28 from line 27	29	
30	Enter the amount, if any, from your 2010 Form 8606, line 33	30	
31	Subtract line 30 from line 26	31	
32	Enter the smaller of line 29 or line 31	32	
33	Enter the total of lines 20a and 25a from your 2010 Form 8606	33	
34	Add lines 32 and 33	34	
35	Enter the smaller of line 31 or line 34	35	
36	Taxable amount. Add lines 25 and 35. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	36	1,873
Next. If the amount on line 26 is more than zero, complete lines 37 and 38 to refigure the amount you must include in your income in 2012; otherwise, skip lines 37 and 38.			
37	Add lines 30 and 35	37	
38	Amount subject to tax in 2012. Subtract line 37 from line 26. If you do not take a distribution in 2012 from a Roth IRA, enter this amount on the applicable line of your 2012 tax return	38	

Part IV Certain Distributions from Designated Roth Accounts

Complete this part only if you took a distribution from your designated Roth account in 2011 and, in 2010, you had an in-plan rollover to your designated Roth account and you completed lines 25a and 25b of your 2010 Form 8606 that you filed to report the in-plan rollover.

39	Enter the amount from box 10 of your 2011 Form 1099-R	39	
40	Enter the total of lines 25a and 25b from your 2010 Form 8606	40	
41	Enter the amount, if any, from line 3 of the Designated Roth Account Income Acceleration Worksheet in your 2010 Instructions for Form 8606	41	
42	Subtract line 41 from line 40	42	
43	Enter the smaller of line 39 or line 42	43	
44	Enter the amount from line 25a of your 2010 Form 8606	44	
45	Add lines 43 and 44	45	
46	Taxable amount. Enter the smaller of line 42 or line 45. Include this amount on Form 1040, line 16b; Form 1040A, line 12b; or Form 1040NR, line 17b	46	
47	Add lines 41 and 46	47	
48	Amount subject to tax in 2012. Subtract line 47 from line 40. Include this amount on the applicable line of your 2012 tax return	48	

Sign Here Only If You Are Filing This Form by Itself and Not With Your Tax Return

Under penalties of perjury, I declare that I have examined this form, including accompanying attachments, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name U	Firm's EIN U			
	Firm's address U	Phone no.			

Form **8606**Department of the Treasury
Internal Revenue Service (99)**Nondeductible IRAs**

See separate instructions.

Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-0074

2011Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file Form 8606. See instructions.

Your social security number

MELISSA J

CALICE

376-84-6196

**Fill in Your Address Only
If You Are Filing This
Form by Itself and Not
With Your Tax Return**

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2011.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2011 **and** you made nondeductible contributions to a traditional IRA in 2011 or an earlier year. For this purpose, a distribution does not include a rollover, qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011 (excluding any portion you recharacterized) **and** you made nondeductible contributions to a traditional IRA in 2011 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2011, including those made for 2011 from January 1, 2012, through April 17, 2012 (see instructions)	1	
2	Enter your total basis in traditional IRAs (see instructions)	2	
3	Add lines 1 and 2	3	
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> In 2011, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? </div> <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> <p>No <input type="checkbox"/> Enter the amount from line 3 on line 14. Do not complete the rest of Part I.</p> <p>Yes <input type="checkbox"/> Go to line 4.</p> </div>			
4	Enter those contributions included on line 1 that were made from January 1, 2012, through April 17, 2012	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2011, plus any outstanding rollovers (see instructions)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2011. Do not include rollovers, qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011. Do not include amounts converted that you later recharacterized (see instructions). Also enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2011 and earlier years	14	
15	Taxable amount. Subtract line 12 from line 7. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b Note: You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59½ at the time of the distribution (see instructions).	15	

Part II 2011 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2011 (excluding any portion you recharacterized).

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2011. Do not include amounts you later recharacterized back to traditional, SEP, or SIMPLE IRAs in 2011 or 2012 (see instructions)	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	Taxable amount. Subtract line 17 from line 16. Also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	18	

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form **8606** (2011)

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2011. For this purpose, a distribution does not include a rollover, a qualified charitable distribution, a one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2011, including any qualified first-time homebuyer distributions and certain qualified distributions (see instructions)	19	5,317
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-, skip lines 22 through 24, and enter -0- on line 25	21	5,317
22	Enter your basis in Roth IRA contributions (see instructions)	22	4,000
23	Subtract line 22 from line 21. If zero or less, enter -0-, skip line 24, and enter -0- on line 25. If more than zero, you may be subject to an additional tax (see instructions)	23	1,317
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA (see instructions)	24	
25	Subtract line 24 from line 23. If zero or less, enter -0- and see the Note below. Note. If you completed lines 20a and 20b or 25a and 25b of your 2010 Form 8606, go to line 26 (see instructions). Otherwise, skip lines 26 through 35 and go to line 36.	25	1,317
26	Enter the total of lines 20a, 20b, 25a, and 25b from your 2010 Form 8606. (If zero, see the note above)	26	
27	Enter the smaller of line 23 or line 24	27	
28	Enter the portion of line 24, if any, that was converted before 2010 (see instructions)	28	
29	Subtract line 28 from line 27	29	
30	Enter the amount, if any, from your 2010 Form 8606, line 33	30	
31	Subtract line 30 from line 26	31	
32	Enter the smaller of line 29 or line 31	32	
33	Enter the total of lines 20a and 25a from your 2010 Form 8606	33	
34	Add lines 32 and 33	34	
35	Enter the smaller of line 31 or line 34	35	
36	Taxable amount. Add lines 25 and 35. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	36	1,317
Next. If the amount on line 26 is more than zero, complete lines 37 and 38 to refigure the amount you must include in your income in 2012; otherwise, skip lines 37 and 38.			
37	Add lines 30 and 35	37	
38	Amount subject to tax in 2012. Subtract line 37 from line 26. If you do not take a distribution in 2012 from a Roth IRA, enter this amount on the applicable line of your 2012 tax return	38	

Part IV Certain Distributions from Designated Roth Accounts

Complete this part only if you took a distribution from your designated Roth account in 2011 and, in 2010, you had an in-plan rollover to your designated Roth account and you completed lines 25a and 25b of your 2010 Form 8606 that you filed to report the in-plan rollover.

39	Enter the amount from box 10 of your 2011 Form 1099-R	39	
40	Enter the total of lines 25a and 25b from your 2010 Form 8606	40	
41	Enter the amount, if any, from line 3 of the Designated Roth Account Income Acceleration Worksheet in your 2010 Instructions for Form 8606	41	
42	Subtract line 41 from line 40	42	
43	Enter the smaller of line 39 or line 42	43	
44	Enter the amount from line 25a of your 2010 Form 8606	44	
45	Add lines 43 and 44	45	
46	Taxable amount. Enter the smaller of line 42 or line 45. Include this amount on Form 1040, line 16b; Form 1040A, line 12b; or Form 1040NR, line 17b	46	
47	Add lines 41 and 46	47	
48	Amount subject to tax in 2012. Subtract line 47 from line 40. Include this amount on the applicable line of your 2012 tax return	48	

Sign Here Only If You Are Filing This Form by Itself and Not With Your Tax Return

Under penalties of perjury, I declare that I have examined this form, including accompanying attachments, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name U	Firm's EIN U			
	Firm's address U	Phone no.			

Form **8863**Department of the Treasury
Internal Revenue Service (99)

Education Credits (American Opportunity and Lifetime Learning Credits)

See separate instructions to find out if you are eligible to take the credits.
Attach to Form 1040 or Form 1040A.

OMB No. 1545-0074

2011Attachment
Sequence No. **50**

Name(s) shown on return

RICHARD A CALICE JR & MELISSA J CALICE

Your social security number

383-86-2186



You cannot take both an education credit and the tuition and fees deduction (see Form 8917) for the **same student** for the same year.

Part I American Opportunity Credit**Caution:** You **cannot** take the American opportunity credit for more than **4** tax years for the **same student**.

1	(a) Student's name (as shown on page 1 of your tax return) First name Last name	(b) Student's social security number (as shown on page 1 of your tax return)	(c) Qualified expenses (see instructions). Do not enter more than \$4,000 for each student.	(d) Subtract \$2,000 from the amount in column (c). If zero or less, enter -0-.	(e) Multiply the amount in column (d) by 25% (.25)	(f) If column (d) is zero, enter the amount from column (c). Otherwise, add \$2,000 to the amount in column (e).	
	MELISSA CALICE	376-84-6196	2,058	58	15	2,015	
2	Tentative American opportunity credit. Add the amounts on line 1, column (f). If you are taking the lifetime learning credit for a different student, go to Part II; otherwise, go to Part III					2	2,015

Part II Lifetime Learning Credit**Caution:** You **cannot** take the American opportunity credit and the lifetime learning credit for the **same student** in the same year.

3	(a) Student's name (as shown on page 1 of your tax return) First name Last name	(b) Student's social security number (as shown on page 1 of your tax return)	(c) Qualified expenses (see instructions)
4	Add the amounts on line 3, column (c), and enter the total		4
5	Enter the smaller of line 4 or \$10,000		5
6	Tentative lifetime learning credit. Multiply line 5 by 20% (.20). If you have an entry on line 2, go to Part III; otherwise go to Part IV		6

For Paperwork Reduction Act Notice, see your tax return instructions.Form **8863** (2011)

Part III Refundable American Opportunity Credit

7 Enter the amount from line 2	7	2,015
8 Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying widow(er)	8	180,000
9 Enter the amount from Form 1040, line 38, or Form 1040A, line 22. If you are filing Form 2555, 2555-EZ, or 4563, or you are excluding income from Puerto Rico, see Pub. 970 for the amount to enter	9	135,534
10 Subtract line 9 from line 8. If zero or less, stop ; you cannot take any education credit	10	44,466
11 Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	11	20,000
12 If line 10 is: <ul style="list-style-type: none"> Equal to or more than line 11, enter 1.000 on line 12 Less than line 11, divide line 10 by line 11. Enter the result as a decimal (rounded to at least three places) 	12	1.000
13 Multiply line 7 by line 12. Caution: If you were under age 24 at the end of the year and meet the conditions on page 4 of the instructions, you cannot take the refundable American opportunity credit. Skip line 14, enter the amount from line 13 on line 15, and check this box <input type="checkbox"/>	13	2,015
14 Refundable American opportunity credit. Multiply line 13 by 40% (.40). Enter the amount here and on Form 1040, line 66, or Form 1040A, line 43. Then go to line 15 below	14	806

Part IV Nonrefundable Education Credits

15 Subtract line 14 from line 13	15	1,209
16 Enter the amount from line 6, if any. If you have no entry on line 6, skip lines 17 through 22, and enter the amount from line 15 on line 6 of the Credit Limit Worksheet (see instructions)	16	
17 Enter: \$122,000 if married filing jointly; \$61,000 if single, head of household, or qualifying widow(er)	17	
18 Enter the amount from Form 1040, line 38, or Form 1040A, line 22. If you are filing Form 2555, 2555-EZ, or 4563, or you are excluding income from Puerto Rico, see Pub. 970 for the amount to enter	18	
19 Subtract line 18 from line 17. If zero or less, skip lines 20 and 21, and enter zero on line 22	19	
20 Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	20	
21 If line 19 is: <ul style="list-style-type: none"> Equal to or more than line 20, enter 1.000 on line 21 and go to line 22 Less than line 20, divide line 19 by line 20. Enter the result as a decimal (rounded to at least three places) 	21	
22 Multiply line 16 by line 21. Enter here and on line 1 of the Credit Limit Worksheet (see instructions) <input type="checkbox"/>	22	
23 Nonrefundable education credits. Enter the amount from line 11 of the Credit Limit Worksheet (see instructions) here and on Form 1040, line 49, or Form 1040A, line 31	23	1,209

Form **8889****Health Savings Accounts (HSAs)**

OMB No. 1545-0074

2011Attachment
Sequence No. **53**Department of the Treasury
Internal Revenue ServiceU **Attach to Form 1040 or Form 1040NR.**U **See separate instructions.**

Name(s) shown on Form 1040 or Form 1040NR

RICHARD A CALICE JR
MELISSA J CALICE

Social security number of HSA

beneficiary. If both spouses have

HSAs, see instructions U **383-86-2186****Before you begin:** Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.**Part I HSA Contributions and Deduction.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2011 (see instructions)	U	<input type="checkbox"/> Self-only	<input type="checkbox"/> Family
2	HSA contributions you made for 2011 (or those made on your behalf), including those made from January 1, 2012, through April 17, 2012, that were for 2011. Do not include employer contributions, contributions through a cafeteria plan, or rollovers (see instructions)		2	
3	If you were under age 55 at the end of 2011, and on the first day of every month during 2011, you were, or were considered, an eligible individual with the same coverage, enter \$3,050 (\$6,150 for family coverage). All others , see the instructions for the amount to enter		3	
4	Enter the amount you and your employer contributed to your Archer MSAs for 2011 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2011, also include any amount contributed to your spouse's Archer MSAs		4	
5	Subtract line 4 from line 3. If zero or less, enter -0-		5	
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2011, see the instructions for the amount to enter		6	
7	If you were age 55 or older at the end of 2011, married, and you or your spouse had family coverage under an HDHP at any time during 2011, enter your additional contribution amount (see instructions)		7	
8	Add lines 6 and 7		8	
9	Employer contributions made to your HSAs for 2011	9		
10	Qualified HSA funding distributions	10		
11	Add lines 9 and 10		11	
12	Subtract line 11 from line 8. If zero or less, enter -0-		12	
13	HSA deduction. Enter the smaller of line 2 or line 12 here and on Form 1040, line 25, or Form 1040NR, line 25		13	
Caution: If line 2 is more than line 13, you may have to pay an additional tax (see instructions).				

Part II HSA Distributions. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2011 from all HSAs (see instructions)	14a	4,638
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return (see instructions)	14b	
c	Subtract line 14b from line 14a	14c	4,638
15	Unreimbursed qualified medical expenses (see instructions)	15	4,700
16	Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Form 1040, line 21, or Form 1040NR, line 21. On the dotted line next to line 21, enter "HSA" and the amount	16	0
17a	If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here	U	<input type="checkbox"/>
b	Additional 20% tax (see instructions). Enter 20% (.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also include this amount in the total on Form 1040, line 60, or Form 1040NR, line 59. On the dotted line next to Form 1040, line 60, or Form 1040NR, line 59, enter "HSA" and the amount	17b	

For Paperwork Reduction Act Notice, see your tax return instructions.Form **8889** (2011)

Part III **Income and Additional Tax for Failure To Maintain HDHP Coverage.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18 Qualified HSA distribution	18	
19 Last-month rule	19	
20 Qualified HSA funding distribution	20	
21 Total income. Add lines 18, 19, and 20. Include this amount on Form 1040, line 21, or Form 1040NR, line 21. On the dotted line next to Form 1040, line 21, or Form 1040NR, line 21, enter "HSA" and the amount	21	
22 Additional tax. Multiply line 21 by 10% (.10). Include this amount in the total on Form 1040, line 60, or Form 1040NR, line 59. On the dotted line next to Form 1040, line 60, or Form 1040NR, line 59, enter "HDHP" and the amount	22	

Form **8889** (2011)

Form **3903**Department of the Treasury
Internal Revenue Service (99)**Moving Expenses**U **Attach to Form 1040 or Form 1040NR.**

OMB No. 1545-0074

2011
Attachment
Sequence No. **170**

Name(s) shown on return

Your social security number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

Before you begin: ☐ See the **Distance Test** and **Time Test** in the instructions to find out if you can deduct your moving expenses.☐ See **Members of the Armed Forces** in the instructions, if applicable.

1	Transportation and storage of household goods and personal effects (see instructions)	1	4,104
2	Travel (including lodging) from your old home to your new home (see instructions). Do not include the cost of meals	2	961
3	Add lines 1 and 2	3	5,065
4	Enter the total amount your employer paid you for the expenses listed on lines 1 and 2 that is not included in box 1 of your Form W-2 (wages). This amount should be shown in box 12 of your Form W-2 with code P	4	
5	Is line 3 more than line 4? <input type="checkbox"/> No. You cannot deduct your moving expenses. If line 3 is less than line 4, subtract line 3 from line 4 and include the result on Form 1040, line 7, or Form 1040NR, line 8. <input checked="" type="checkbox"/> Yes. Subtract line 4 from line 3. Enter the result here and on Form 1040, line 26, or Form 1040NR, line 26. This is your moving expense deduction	5	5,065

For Paperwork Reduction Act Notice, see your tax return instructions.Form **3903** (2011)

Form **4562**

Depreciation and Amortization

(Including Information on Listed Property)

OMB No. 1545-0172

2011Department of the Treasury
Internal Revenue Service (99)☐ See separate instructions.☐ Attach to your tax return.Attachment
Sequence No. **179**

Name(s) shown on return

RICHARD A CALICE JR & MELISSA J CALICE

Identifying number

383-86-2186

Business or activity to which this form relates

SOFTWARE CONSULTANT

Part I Election To Expense Certain Property Under Section 179**Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000
2	Total cost of section 179 property placed in service (see instructions)	2	976
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,000,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	0
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	500,000
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
	OFFICE SCANNER	976	976
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	976
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	976
10	Carryover of disallowed deduction from line 13 of your 2010 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	138,887
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	976
13	Carryover of disallowed deduction to 2012. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2011	17	0
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

Section B—Assets Placed in Service During 2011 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2011 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	976
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.Form **4562** (2011)

Part V Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.**Section A—Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed?				<input checked="" type="checkbox"/> Yes		<input type="checkbox"/> No		24b If "Yes," is the evidence written?				<input checked="" type="checkbox"/> Yes		<input type="checkbox"/> No	
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost							
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)								25							
26 Property used more than 50% in a qualified business use:															
AUTO	01/01/09	51.00 %													
		%													
27 Property used 50% or less in a qualified business use:															
		%				S/L-									
		%				S/L-									
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1								28							
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1										29					

Section B—Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1	(b) Vehicle 2	(c) Vehicle 3	(d) Vehicle 4	(e) Vehicle 5	(f) Vehicle 6
30 Total business/investment miles driven during the year (do not include commuting miles)	6,856					
31 Total commuting miles driven during the year	2,400					
32 Total other personal (noncommuting) miles driven	4,188					
33 Total miles driven during the year. Add lines 30 through 32	13,444					
34 Was the vehicle available for personal use during off-duty hours?	Yes X	No	Yes X	No	Yes X	No
35 Was the vehicle used primarily by a more than 5% owner or related person?	Yes X	No	Yes X	No	Yes X	No
36 Is another vehicle available for personal use?	Yes X	No	Yes X	No	Yes X	No

Section C—Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see instructions).

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No X
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners	Yes	No X
39 Do you treat all use of vehicles by employees as personal use?	Yes	No X
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?	Yes	No X
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions.)	Yes	No X

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2011 tax year (see instructions):					
43 Amortization of costs that began before your 2011 tax year					43
44 Total. Add amounts in column (f). See the instructions for where to report					44

Form 1040	Auto Worksheet	2011
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Name RICHARD A CALICE JR & MELISSA J CALICE	Taxpayer Identification Number 383-86-2186
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Description SOFTWARE CONSULTANT

Form/Schedule C Unit number 1

Vehicle 1 - Date 01/01/09 Description AUTO

Vehicle 2 - Date _____ Description _____

Vehicle 3 - Date _____ Description _____

General Information

	Vehicle 1	Vehicle 2	Vehicle 3
1. Total mileage	13,444		
2 a. Business miles (51 cents per mile)	3,428		
b. Business miles (55.5 cents per mile)	3,428		
3. Commuting mileage	2,400		
4. Other mileage	4,188		
5. Business use percentage	51.00 %	%	%

Actual Expenses

6. Parking fees and tolls			
7 a. Gasoline, oil, repairs, insurance, etc.			
b. Interest, registration & taxes			
c. Vehicle rentals (net of inclusion amount)			
8. Total expenses. Add lines 7a - 7c			
9. Business use percentage from line 5	51.00 %	%	%
10. Business use portion of actual expenses			
11. Depreciation			
12. Total actual expense allowable. Add lines 6, 10 and 11			

Standard Mileage Rate Method

13. Business mileage (line 2) multiplied by applicable rate	3,651		
14. Parking fees and tolls from line 6			
15. Line 7b (Int & taxes only) multiplied by bus pct (line 5)			
16. Standard mileage rate	3,651		

Vehicle 4 - Date _____ Description _____

Vehicle 5 - Date _____ Description _____

Vehicle 6 - Date _____ Description _____

General Information

	Vehicle 4	Vehicle 5	Vehicle 6
1. Total mileage			
2 a. Business miles (51 cents per mile)			
b. Business miles (55.5 cents per mile)			
3. Commuting mileage			
4. Other mileage			
5. Business use percentage	%	%	%

Actual Expenses

6. Parking fees and tolls			
7 a. Gasoline, oil, repairs, insurance, etc.			
b. Interest, registration & taxes			
c. Vehicle rentals (net of inclusion amount)			
8. Total expenses. Add lines 7a - 7c			
9. Business use percentage from line 5	%	%	%
10. Business use portion of actual expenses			
11. Depreciation			
12. Total actual expense allowable. Add lines 6, 10 and 11			

Standard Mileage Rate Method

13. Business mileage (line 2) multiplied by applicable rate			
14. Parking fees and tolls from line 6			
15. Line 7b (Int & taxes only) multiplied by bus pct (line 5)			
16. Standard mileage rate			

	Vehicle expense	Vehicle rentals	Vehicle depreciation	Total allowable deduction
Allowable Deduction	3,651			3,651

Form 1040	General Sales Tax Deduction Worksheet	2011
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Name as shown on return
RICHARD A CALICE JR & MELISSA J CALICE

Taxpayer Identification Number
383-86-2186

State of MARYLAND	Locality of
-----------------------------	-------------

General Sales Tax from IRS Tables

1. Enter the amount of adjusted gross income (AGI) from Form 1040, Line 37 1. 135,534
2. Add the nontaxable amounts from Form 1040, lines 8b, 15a, 16a, 20a (Exclude rollovers and tax-free Sec. 1035 exchanges) 2. 20,000
3. Add the following nontaxable items: nontaxable combat pay, public assistance, veteran's benefits, and workers' compensation.
 Also include any amounts which increase spendable income, such as the refundable portion of refundable tax credits received in 2011 3. 752
4. Add lines 1 through 3, this is income for general sales tax table purposes 4. 156,286
5. Enter the amount from the sales tax table in the Schedule A instructions. 5. 1,193
 Part-year residents, complete lines 6 - 8; Full-year residents skip lines 6 - 8
 and enter the amount from line 5 on line 9
6. Enter the number of days of residence in state 6. _____
7. Total days in year 7. 365
8. Divide line 6 by line 7 (rounded to at least 3 decimal places) 8. _____
9. Multiply line 5 by line 8, this is the deductible general sales tax using the IRS table. 9. 1,193

Local Sales Tax Using IRS Tables

10. Enter the amount from the sales tax table in the Schedule A instructions. 10. _____
11. If you are a resident of Alaska, Arizona, Arkansas, California (Los Angeles County only), Colorado, Georgia, Illinois, Louisiana, Missouri, New York State, North Carolina, South Carolina, Tennessee, Utah, or Virginia, enter the amount from the applicable Optional Local Sales Tax Table in the Schedule A instructions. 11. _____
12. Enter the local general sales tax rate (exclude statewide local sales tax rate) 12. _____
13. Enter the state general sales tax rate (include statewide local sales tax rate) 13. _____
14. Divide line 12 by line 13 (rounded to at least 3 decimal places) 14. _____
15. If you entered an amount on line 11, multiply line 11 by line 12. This is the local sales tax using the optional local sales tax tables.
 Part-year residents, complete lines 16 - 18; Full-year residents skip lines 16 - 18
 and enter the amount from line 15 on line 19
 If you did not enter an amount on line 11, multiply line 10 by line 14. This is the local sales tax using the optional state and certain local sales tax tables.
 Part-year residents, complete lines 16 - 18; Full-year residents skip lines 16 - 18
 and enter the amount from line 15 on line 19 15. _____
16. Enter the number of days of residence in locality 16. _____
17. Total days in year 17. 365
18. Divide line 16 by line 17 (rounded to at least 3 decimal places) 18. _____
19. Multiply line 15 by line 18. This is the deductible general local sales tax using the IRS tables. 19. _____

General Sales Tax Summary

20. Enter the sum of line 9 from all General Sales Tax Deduction Worksheets 20. 1,193
21. Enter the sum of line 19 from all General Sales Tax Deduction Worksheets 21. _____
22. Add lines 20 and 21, this is the total General Sales taxes using the tables 22. 1,193
23. Enter the actual state and local general sales taxes paid 23. _____
24. Enter the greater of line 22 or line 23 24. 1,193
25. Enter the state and local taxes paid on specified items (major purchases) 25. _____
26. Add lines 24 and 25, this is the deductible General Sales tax 26. 1,193
27. Enter total state and local income taxes paid 27. 3,126

Enter the greater of line 26 or 27 on Schedule A, line 5. If line 26 is greater, mark Schedule A, line 5b. If line 27 is greater, mark Schedule A, line 5a.

Form **1040****Child Tax Credit Worksheets****2011**

Name

RICHARD A CALICE JR & MELISSA J CALICE

Taxpayer Identification Number

383-86-2186

Child Tax Credit Worksheet - Form 1040, Line 51, Form 1040A, Line 33 or Form 1040NR, Line 48

1. Number of qualifying children: <u>2</u> x \$1,000. Enter the result.	1. <u>2,000</u>
2. Enter the amount from Form 1040, line 38, Form 1040A, line 22, or Form 1040NR, line 37.	2. <u>135,534</u>
3. Enter the total of any exclusion of income from Puerto Rico, and amounts from Form 2555, lines 45 and 50 or Form 2555-EZ, line 18.	3. _____
4. Add lines 2 and 3.	4. <u>135,534</u>
5. Enter: \$110,000 if married filing jointly; \$75,000 if single, head of household, or qualifying widow(er); \$55,000 if married filing separately.	5. <u>110,000</u>
6. Is the amount on line 4 more than the amount on line 5?	
<input type="checkbox"/> No. Leave line 6 blank. Enter -0- on line 7.	
<input checked="" type="checkbox"/> Yes. Subtract line 5 from line 4. If the result is not a multiple of \$1,000, increase it to the next multiple of \$1,000. }	6. <u>26,000</u>
7. Multiply the amount on line 6 by 5% (.05). Enter the result.	7. <u>1,300</u>
8. Subtract line 7 from line 1. If zero or less, stop here ; you cannot take this credit.	8. <u>700</u>
9. Enter the amount from Form 1040, line 46, Form 1040A, line 28, or Form 1040NR, line 44.	9. <u>18,028</u>
10. Add the amounts from Form 1040 lines 47, 48, 49, 50, or Form 1040A lines 29, 31, and 32, or Form 1040 NR, lines 45, 46, and 47, plus any amounts from Form 5695, In 14, Form 8834, In 23, Form 8910, In 22, Form 8936, In 15, and Schedule R, In 22. Enter the total.	10. <u>1,709</u>
11. Are you claiming any of the following credits?	
<input checked="" type="checkbox"/> Mortgage interest credit, Form 8396 <input type="checkbox"/> Residential energy efficient property credit, Form 5695, Part II <input type="checkbox"/> District of Columbia first-time homebuyer credit, Form 8859	
<input checked="" type="checkbox"/> No. Enter the amount from line 10.	11. <u>1,709</u>
<input type="checkbox"/> Yes. Enter the amount from Child Tax Credit - Line 11 Worksheet below. }	12. <u>16,319</u>
12. Subtract line 11 from line 9.	13. <u>700</u>
13. Child tax credit. Enter the smaller of line 8 or line 12 here and on Form 1040, line 51, Form 1040A, line 33 or Form 1040NR, line 48.	

Child Tax Credit - Line 11 WorksheetUse this worksheet **only** if you checked "Yes" on line 11 of the Child Tax Credit Worksheet above.

1. Enter the amount from line 8 of the Child Tax Credit Worksheet above.	1. _____
2. Enter the taxable earned income from the Child Tax Credit Taxable Earned Income Worksheet.	2. _____
3. Is the amount on line 2 more than \$3,000?	
<input type="checkbox"/> No. Leave line 3 blank, enter -0- on line 4, and go to line 5.	
<input type="checkbox"/> Yes. Subtract \$3,000 from the amount on line 2. Enter the result. }	3. _____
4. Multiply the amount on line 3 by 15% (.15) and enter the result.	4. _____
5. Is the amount on line 1 of the Child Tax Worksheet above \$3,000 or more?	
<input type="checkbox"/> No. If line 4 above is:	
<input type="checkbox"/> Zero, enter the amount from line 1 above on line 12 of this worksheet. Do not complete the rest of this worksheet. Instead, enter the amount from Child Tax Credit Worksheet line 10 on line 11, and complete lines 12 and 13.	
<input type="checkbox"/> More than zero, leave lines 6 through 9 blank, enter 0 on line 10, go to line 11 below.	
<input type="checkbox"/> Yes. If line 4 above is equal to or more than line 1 above, leave lines 6 through 9 blank, enter -0- on line 10, and go to line 11 below. Otherwise go to line 6.	
6. Enter the total social security and Medicare taxes withheld from your pay (and your spouse's if filing a joint return). These taxes should be shown in boxes 4 and 6 of your Form(s) W-2. If you worked for a railroad, see below.	6. _____
7. Enter the total of the amounts from Form 1040, line 27 and line 57 (Form 1040NR, lines 27 and 55), plus any taxes identified with code "UT" on the dotted line next to Form 1040, line 60 (Form 1040NR, line 59).	7. _____
8. Add lines 6 and 7.	8. _____
9. Add the amounts from Form 1040, lines 64a and 69 or Form 1040A, line 38a and excess social security tax included on line 41 or Form 1040NR, line 65. Enter total.	9. _____
10. Subtract line 9 from line 8. If the result is zero or less, enter -0-.	10. _____
11. Enter the larger of line 4 or line 10.	11. _____
12. Is the amount on line 11 of this worksheet more than the amount on line 1?	
<input type="checkbox"/> No. Subtract line 11 from line 1. Enter the result.	
<input type="checkbox"/> Yes. Enter -0-.	12. _____
Next , complete Forms 8396, Form 5695 (Part II), or Form 8859 where applicable.	
13. Enter the total of the amounts from Form 8396, line 9, Form 5695, line 31 and Form 8859, line 9.	13. _____
14. Enter the amount from line 10 of the Child Tax Credit Worksheet above.	14. _____
15. Add lines 13 and 14. Enter this amount on line 11 of the Child Tax Credit Worksheet above.	15. _____

Railroad employees. Include in the total on line 6 above any of the following taxes.

- Tier 1 tax withheld from your pay. This tax should be shown in box 14 of your form(s) W-2 and identified as "Tier 1 tax".
- If you were an employee representative, 50% of the total Tier 1 tax and Tier 1 Medicare tax you paid for 2011.

Form 1040	Student Loan Interest Deduction Worksheet	2011
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Name(s) as shown on return

Taxpayer Identification Number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

- | | |
|--|-------------------|
| 1. Enter the total interest you paid in 2011 on qualified students. Do not enter more than \$2,500 | 1. <u>251</u> |
| 2. Enter the amount from Form 1040, line 22 or 1040A, line 15 | 2. <u>141,101</u> |
| Do not include any amounts from foreign earned income exclusion, foreign housing exclusion, exclusion of income from U.S. possessions, exclusion of income from Puerto Rico by bona fide residents of Puerto Rico | |
| 3. Enter the total of the amounts from Form 1040, lines 23 through 32, plus any amount you entered on the dotted line next to line 36, or 1040A, lines 16 and 17 | 3. <u>5,447</u> |
| 4. Modified AGI. Subtract line 3 from line 2 | 4. <u>135,654</u> |
| Note: If line 4 is \$75,000 or more if single, head of household, or qualifying widow(er) or \$150,000 or more if married filing jointly, stop here . You cannot take the deduction | |
| 5. Enter: \$60,000 if single, head of household, or qualifying widow(er); \$120,000 if married filing jointly | 5. <u>120,000</u> |
| 6. Subtract line 5 from line 4. If zero or less, enter -0- here and on line 8, skip line 7, and go to line 9 | 6. <u>15,654</u> |
| 7. Divide line 6 by \$15,000 if single, head of household, or qualifying widow(er); \$30,000 if married filing jointly. Enter the result as a decimal (rounded to at least three decimal places) | 7. <u>0.522</u> |
| 8. Multiply line 1 by line 7 | 8. <u>131</u> |
| 9. Student loan interest deduction. Subtract line 8 from line 1. Enter the result here and on Form 1040, line 33, or 1040A, line 18. Do not include this amount in figuring any other deduction on your return (such as on Schedule A, C, E, etc.) | 9. <u>120</u> |

Form 1040	Late Filing Interest and Penalty Worksheets	2011
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Name

Taxpayer Identification Number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

Late Filing Interest Worksheet

Description	Amount	Balance	# of Days	Interest Rate %	Interest Amount
TAX DUE - 4/15/12	1,286	1,286			
4/15/12 - 6/30/12		1,286	76	3.00	8
6/30/12 - 9/30/12		1,294	92	3.00	10
9/30/12 - 10/15/12		1,304	15	3.00	2
DATE FILED - 10/15/12		1,306			
Total Late Filing Interest (Int)					20

Late Payment Penalty Worksheet

Description	Amount	Balance	# of Months	Penalty Amount
Total Late Payment Penalty (FTP)				

Form 1040	Nonrefundable Personal Credit Limitation Worksheet	2011
Name RICHARD A CALICE JR & MELISSA J CALICE		Taxpayer Identification Number 383-86-2186

Amounts from tax return

a. Regular tax (Form 1040, line 44)	a. <u>18,028</u>	g. CTC, line 11 wrk, line 12	g. _____	m. Form 8834, line 23	m. _____
b. AMT (Form 1040, line 45)	b. _____	h. Child tax cr (Form 1040, line 51)	h. <u>700</u>	n. Form 8859, line 9	n. _____
c. Foreign tax cr (Form 1040, line 47)	c. _____	i. Form 5695, line 14	i. _____	o. Form 8910, line 22	o. _____
d. Child care cr (Form 1040, line 48)	d. <u>500</u>	j. Form 5695, line 31	j. _____	p. Form 8936, line 15	p. _____
e. Education cr (Form 1040, line 49)	e. <u>1,209</u>	k. Form 8396, line 9	k. _____	q. Form 8834, line 30	q. _____
f. Retirement cr (Form 1040, line 50)	f. _____	l. Elderly cr (Sch R, line 22)	l. _____	r. Form 3800, line 38	r. _____

	Form 2441	Schedule R	Form 8880	Form 5695, Part I	Form 5695, Part II
1. Total tax available	1. <u>18,028</u>	_____	_____	_____	_____
2. Other nonrefundable personal credits allowed	2. _____	_____	_____	_____	_____
3. Limitation based on tax liability, line 1 minus line 2	3. <u>18,028</u>	_____	_____	_____	_____
4. Amount from line 3 reported on	4. <u>F2441, LN 10</u>	_____	_____	_____	_____
5. Code(s) for tax amount(s) from above	5. <u>A B</u>	_____	_____	_____	_____
6. Code(s) for credit amount(s) from above	6. <u>C</u>	_____	_____	_____	_____

	Form 8834, Sec C	Form 8910, Part III	Form 8911, Part III	Form 8936, Part III	Form 8396
1. Total tax available	1. _____	_____	_____	_____	_____
2. Other nonrefundable personal credits allowed	2. _____	_____	_____	_____	_____
3. Limitation based on tax liability, line 1 minus line 2	3. _____	_____	_____	_____	_____
4. Amount from line 3 reported on	4. _____	_____	_____	_____	_____
5. Code(s) for tax amount(s) from above	5. _____	_____	_____	_____	_____
6. Code(s) for credit amount(s) from above	6. _____	_____	_____	_____	_____

	Form 8859	Form 8801
1. Total tax available	1. _____	_____
2. Other nonrefundable personal credits allowed	2. _____	_____
3. Limitation based on tax liability, line 1 minus line 2	3. _____	_____
4. Amount from line 3 reported on	4. _____	_____
5. Code(s) for tax amount(s) from above	5. _____	_____
6. Code(s) for credit amount(s) from above	6. _____	_____

Form 8863, Line 23

1. Enter the amount from Form 8863, line 22	<u>18,028</u>	7. Enter the amount from Form 1040, line 46	<u>18,028</u>
2. Enter the amount from Form 1040, line 46	<u>18,028</u>	8. Enter the total of code(s) c, d, and l from above and the amount from line 5	<u>500</u>
3. Enter the total of code(s) c, d, and l from above	<u>500</u>	9. Subtract line 8 from line 7	<u>17,528</u>
4. Subtract line 3 from line 2	<u>17,528</u>	10. Nonrefundable American opportunity credit. Enter the smaller of line 6 or line 9	<u>1,209</u>
5. Nonrefundable lifetime learning credit. Enter the smaller of line 1 or line 4	<u>1,209</u>	11. Nonrefundable education credits. Add line 5 and line 10. Enter here and on Form 8863, line 23	<u>1,209</u>
6. Enter the amount from Form 8863, line 15	<u>1,209</u>		

Form 1040	Net Earnings from Self-Employment Worksheet	2011
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Name

Taxpayer Identification Number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

	Taxpayer	Spouse
Farm profit or (loss)		
Schedule F		
Farm Partnerships - Schedule K-1, box 14, code A		
Auto expense from farm partnerships	()	()
Amortization from farm partnerships	()	()
Depreciation & Section 179 from farm partnerships	()	()
Depletion from farm partnerships	()	()
Other expenses from farm partnerships	()	()
Home office expenses from farm partnerships	()	()
Unreimbursed partnership expenses from farm partnerships	()	()
Farm adjustment to SE Income		
Net farm profit or (loss) - Schedule SE line 1a	0	0
Conservation Reserve Program payments to social security/disability benefit recipients included on Sch F, In 4b or listed on Sch K-1 (Form 1065), box 20, code Y - Sch SE line 1b	() 0	() 0
Nonfarm profit or (loss)		
Schedule C (excluding minister Schedule C income reported below)	28,485	
Nonfarm partnerships - Schedule K-1, box 14, code A		
Auto expense from nonfarm partnerships	()	()
Amortization from nonfarm partnerships	()	()
Depreciation & section 179 from nonfarm partnerships	()	()
Depletion from nonfarm partnerships	()	()
Other expenses from nonfarm partnerships	()	()
Home office expenses from nonfarm partnerships	()	()
Unreimbursed partnership expenses from nonfarm partnerships	()	()
Employee business expenses - Form 2106 (excluding minister 2106 expenses reported below)	()	()
Nonfarm adjustment to SE income		
Self-employment income reported as other income		
Self-employment income from contracts and straddles		
Minister/clergy self-employment income (from Clergy Worksheet Page 4, line 8)		
Net nonfarm profit or (loss) - Schedule SE line 2	28,485	0
Other income items subject to and/or exempt from self-employment tax		
Fees received for services performed as a notary public	()	()
Earnings while debtor in a chapter 11 bankruptcy case		
Taxable community property income/-loss		
Exempt community property income/-loss	()	()
Net adjustment included on Schedule SE, line 3	0	0
Net profit (loss) from self-employment activities - Schedule SE line 3	28,485	0
Church employee income - Schedule SE, Page 2 line 5a		

Form 1040	Tax Refund Worksheet - 2011 State and Local Refunds	2012
------------------	--	-------------

Name

Taxpayer Identification Number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

MI

1. 2011 payments paid in 2012	1.	
2. 2011 extension paid in 2012	2.	2,000
3. 2011 additional payment paid in 2012	3.	
4. Total 2011 payments paid in 2012 (sum of lines 1 through 3)	4.	2,000
5. Total payments on the 2011 return	5.	5,033
6. Total 2011 overpayment/refund	6.	88
7. 2011 refund attributable to tax paid in 2012 (line 4 divided by line 5 multiplied by line 6)	7.	35
8. 2011 state/local tax refund attributable to tax paid in 2011 (line 6 minus line 7)	8.	53

1. 2011 payments paid in 2012	1.	
2. 2011 extension paid in 2012	2.	
3. 2011 additional payment paid in 2012	3.	
4. Total 2011 payments paid in 2012 (sum of lines 1 through 3)	4.	
5. Total payments on the 2011 return	5.	
6. Total 2011 overpayment/refund	6.	
7. 2011 refund attributable to tax paid in 2012 (line 4 divided by line 5 multiplied by line 6)	7.	
8. 2011 state/local tax refund attributable to tax paid in 2011 (line 6 minus line 7)	8.	

1. 2011 payments paid in 2012	1.	
2. 2011 extension paid in 2012	2.	
3. 2011 additional payment paid in 2012	3.	
4. Total 2011 payments paid in 2012 (sum of lines 1 through 3)	4.	
5. Total payments on the 2011 return	5.	
6. Total 2011 overpayment/refund	6.	
7. 2011 refund attributable to tax paid in 2012 (line 4 divided by line 5 multiplied by line 6)	7.	
8. 2011 state/local tax refund attributable to tax paid in 2011 (line 6 minus line 7)	8.	

1. 2011 payments paid in 2012	1.	
2. 2011 extension paid in 2012	2.	
3. 2011 additional payment paid in 2012	3.	
4. Total 2011 payments paid in 2012 (sum of lines 1 through 3)	4.	
5. Total payments on the 2011 return	5.	
6. Total 2011 overpayment/refund	6.	
7. 2011 refund attributable to tax paid in 2012 (line 4 divided by line 5 multiplied by line 6)	7.	
8. 2011 state/local tax refund attributable to tax paid in 2011 (line 6 minus line 7)	8.	

1. 2011 payments paid in 2012	1.	
2. 2011 extension paid in 2012	2.	
3. 2011 additional payment paid in 2012	3.	
4. Total 2011 payments paid in 2012 (sum of lines 1 through 3)	4.	
5. Total payments on the 2011 return	5.	
6. Total 2011 overpayment/refund	6.	
7. 2011 refund attributable to tax paid in 2012 (line 4 divided by line 5 multiplied by line 6)	7.	
8. 2011 state/local tax refund attributable to tax paid in 2011 (line 6 minus line 7)	8.	

Total of ALL 2011 state/local tax refunds attributable to tax paid in 2012 (sum of lines 7)	35
Total of ALL 2011 state/local tax refunds attributable to tax paid in 2011 (sum of lines 8; for 2012 Tax Refund Wrk)	53

Federal Statements

FEI Com Inc

Form W-2, Box 12

<u>Description</u>	<u>Amount</u>
COST OF GROUP TERM LIFE INSURANCE COVERAGE OVER 50,000	\$ 24
SECTION 401(K) CONTRIBUTIONS	7,504
EMPLOYER CONTRIBUTIONS TO HEALTH SAVINGS ACCOUNT	5,750
TOTAL	\$ <u>13,278</u>

Federal Statements

Schedule A, Line 5 - State and Local Taxes

Description	Amount
STATE WITHHOLDING ON W-2S	\$ 3,033
STATE TAX PAYMENTS	93
TOTAL INCOME TAXES*	<u>3,126</u>
GENERAL SALES TAX	1,193
TOTAL SALES TAXES	<u>1,193</u>

*INCOME TAXES ARE BEING DEDUCTED

Schedule A, Line 10 - Home Mortgage Interest From Form 1098

Description	Amount
DOVENMUEHLE MORTGAGE INC	\$ 9,595
1ST STATE BANK	2,223
TOTAL	<u>\$ 11,818</u>

Federal Statements

Software Consultant

Form 4562, Line 11 - Business Income

Description	Amount
WAGE INCOME	\$ 109,426
BUSINESS INCOME	29,461
TOTAL BUSINESS INCOME	<u>138,887</u>

Federal Asset Report**Software Consultant**

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
<u>Section 179 Expense:</u>												
2	OFFICE SCANNER	11/01/11	976		X	X	N/A	5	HY	200DB	0	976
			<u>976</u>				<u>N/A</u>				<u>0</u>	<u>976</u>
<u>5-year GDS Property:</u>												
2	OFFICE SCANNER	11/01/11	N/A*		X	X	0	5	HY	200DB	0	0
			<u>0</u>				<u>0</u>				<u>0</u>	<u>0</u>
<u>Listed Property:</u>												
1	AUTO	1/01/09	0	51.00			0	0	HY		0	0
			<u>0</u>				<u>0</u>				<u>0</u>	<u>0</u>
Grand Totals			976				0				0	976
Less: Dispositions and Transfers			0				0				0	0
Less: Start-up/Org Expense			0				0				0	0
Net Grand Totals			<u>976</u>				<u>0</u>				<u>0</u>	<u>976</u>

*Because this asset has 179 expense, its cost has been included in the Section 179 Property cost total

90328 Calice Jr, Richard A & Melissa J

09/30/2012 11:58 AM

383-86-2186

Bonus Depreciation Report

FYE: 12/31/2011

Asset	Property Description	Date In Service	Tax Cost	Bus Pct	Tax Sec 179 Exp	Current Bonus	Prior Bonus	Tax - Basis for Depr
<u>Activity: Software Consultant</u>								
2	OFFICE SCANNER	11/01/11	976		976	0	0	0
	Software Consultant		976		976	0	0	0
	Grand Total		976		976	0	0	0

AMT Asset Report

Software Consultant

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per Conv	Meth	Prior	Current
Section 179 Expense:											
2	OFFICE SCANNER	11/01/11	976		X	X	N/A	5	HY 200DB	0	976
			<u>976</u>				<u>N/A</u>			<u>0</u>	<u>976</u>
5-year GDS Property:											
2	OFFICE SCANNER	11/01/11	N/A*		X	X	0	5	HY 200DB	0	0
			<u>0</u>				<u>0</u>			<u>0</u>	<u>0</u>
Listed Property:											
1	AUTO	1/01/09	0	51.00			0	0	HY	0	0
			<u>0</u>				<u>0</u>			<u>0</u>	<u>0</u>
Grand Totals			976				0			0	976
Less: Dispositions and Transfers			<u>0</u>				<u>0</u>			<u>0</u>	<u>0</u>
Net Grand Totals			<u>976</u>				<u>0</u>			<u>0</u>	<u>976</u>

*Because this asset has 179 expense, its cost has been included in the Section 179 Property cost total

90328 Calice Jr, Richard A & Melissa J

09/30/2012 11:58 AM

383-86-2186

Depreciation Adjustment Report

FYE: 12/31/2011

All Business Activities

<u>Form</u>	<u>Unit</u>	<u>Asset</u>	<u>Description</u>	<u>Tax</u>	<u>AMT</u>	<u>AMT Adjustments/ Preferences</u>
<u>MACRS Adjustments:</u>						
C	1	2	OFFICE SCANNER	<u>976</u>	<u>976</u>	<u>0</u>
				<u>976</u>	<u>976</u>	<u>0</u>

EDUCATION EXPENSE OPTIMIZATION REPORT**TAX YEAR 2011**

TAX SUMMARY:	ADJUSTED GROSS INCOME	135,534
	TAXABLE INCOME	103,113
	TAX BEFORE CREDITS	18,028
	NONREFUNDABLE CREDITS	2,409
	OTHER TAXES	1,082
	TOTAL TAX	16,701
	LESS: REFUNDABLE CREDITS	806
	OTHER PAYMENTS	14,609
	ADD: ESTIMATED TAX PENALTY, LATE PENALTIES AND INTEREST	91
	FEDERAL NET DUE/-OVERPAYMENT	1,377
	MARYLAND NET DUE/-OVERPAYMENT	30
	MICHIGAN NET DUE/-OVERPAYMENT	-48
	TOTAL NET DUE/-OVERPAYMENT	1,359
	MARGINAL TAX RATE:	
	FEDERAL	25.000%
	MARYLAND	4.750%
	MICHIGAN	4.350%

	AMERICAN OPPTY CR	LIFETIME LEARNING CR	TUITION AND FEES DED
STUDENT SUMM:			
MELISSA CALICE			
376-84-6196	2,015 (806 REF) *		
TOTALS	2,015 (806 REF)	0	0

* OPTIMIZED AMOUNT

** MAXIMUM AMOUNT ALLOWED

"REF" INDICATES REFUNDABLE PORTION

Form 1040	IRA Distribution Report	2011
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Name

Taxpayer Identification Number

RICHARD A CALICE JR & MELISSA J CALICE

383-86-2186

	T/S	Payer	Gross Distribution 1099-R Box 1	Taxable Amount 1099-R Box 2a <small>[less rollover amount]</small>
A	T	MORGAN STANLEY SMITH BARNEY	17,873	17,873
B	S	MORGAN STANLEY SMITH BARNEY	5,317	5,317
C	—			
D	—			
E	—			
F	—			
G	—			
H	—			
I	—			
J	—			
K	—			
L	—			
M	—			
N	—			
O	—			
		Taxpayer	17,873	17,873
		Spouse	5,317	5,317
		Total	23,190	23,190

TXBL AMOUNT FROM TP'S FORM 8606 REPORTED ON FORM 1040

1,873

TXBL AMOUNT FROM SP'S FORM 8606 REPORTED ON FORM 1040

1,317

	Amount Of Rollover	Federal Withholding	State Withholding	Local Withholding	Traditional IRA Converted to Roth IRA	Original Conversion or Recharacterization	Qualified Roth IRA Distribution
A							
B							
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
N							
O							
Tp							
Sp							
Total							

Form 1040	Salaries & Wages Report	2011
------------------	------------------------------------	-------------

Name RICHARD A CALICE JR & MELISSA J CALICE	Taxpayer Identification Number 383-86-2186
--	---

T/S	Employer	Federal Wages	Federal Withheld	Soc Sec Wages
A T	TAXABLE DEPENDENT CARE BENEFITS	5,000		
B T	FEI COM INC	104,426	8,359	106,800
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
	Taxpayer	109,426	8,359	106,800
	Spouse			
	Totals	109,426	8,359	106,800

	Soc Sec Withheld	Medicare Wages	Medicare Withheld	Soc Sec Tips	Allocated Tips	Dep Care Ben	Other, Box 14
A							
B	4,486	111,929	1,623			5,000	
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
Taxpayer	4,486	111,929	1,623			5,000	
Spouse							
Totals	4,486	111,929	1,623			5,000	

	State	State Wages	State Withheld	Name of Locality	Local Wages	Local Withheld
A						
B	MI	104,426	3,033			
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
Taxpayer		104,426	3,033			
Spouse						
Totals		104,426	3,033			

Filing Instructions

Form(s) 1040-ES - Estimated Tax Payments

Taxable Year Ended December 31, 2012

Name: Richard A Calice Jr & Melissa J Calice

Instructions: Your required estimated tax payments are shown below. Each payment is to be accompanied by a completed Form 1040-ES payment voucher. Make each check payable to the United States Treasury. Write your social security number and "2012 Form 1040-ES" on the check.

Due Dates:	4/17/12	Remittances:	\$0
	6/15/12		\$0
	9/17/12		\$29,070
	1/15/13		\$9,690

Mail To: Internal Revenue Service
P.O. Box 37007
Hartford, CT 06176-0007

INTERNAL REVENUE SERVICE, P.O. BOX 37007, HARTFORD, CT 06176-0007

Form

1040-ESDepartment of the Treasury
Internal Revenue Service**2012 Estimated Tax****Payment
Voucher 3**

OMB No. 1545-0074

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to **"United States Treasury."** Write your social security number and "2012 Form 1040-ES" on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Calendar year-Due Sept. 17, 2012

Amount of estimated tax you are paying
by check or
money order.

Dollars

29,070

Print or type	Your first name and initial RICHARD A	Your last name CALICE JR	Your social security number 383-86-2186
	If joint payment, complete for spouse		
	Spouse's first name and initial MELISSA J	Spouse's last name CALICE	Spouse's social security number 376-84-6196
	Address (number, street, and apt. no.) 43 WINTERBERRY COURT		
	City, state, and ZIP code. (If a foreign address, enter city, province or state, postal code, and country.) COCKEYSVILLE MD 21030		

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

DAA

CUT HERE

INTERNAL REVENUE SERVICE, P.O. BOX 37007, HARTFORD, CT 06176-0007

Form

1040-ESDepartment of the Treasury
Internal Revenue Service**2012 Estimated Tax****Payment
Voucher 2**

OMB No. 1545-0074

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to **"United States Treasury."** Write your social security number and "2012 Form 1040-ES" on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Calendar year-Due June 15, 2012

Amount of estimated tax you are paying
by check or
money order.

Dollars

Print or type	Your first name and initial RICHARD A	Your last name CALICE JR	Your social security number 383-86-2186
	If joint payment, complete for spouse		
	Spouse's first name and initial MELISSA J	Spouse's last name CALICE	Spouse's social security number 376-84-6196
	Address (number, street, and apt. no.) 43 WINTERBERRY COURT		
	City, state, and ZIP code. (If a foreign address, enter city, province or state, postal code, and country.) COCKEYSVILLE MD 21030		

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

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INTERNAL REVENUE SERVICE, P.O. BOX 37007, HARTFORD, CT 06176-0007

Form

1040-ESDepartment of the Treasury
Internal Revenue Service**2012 Estimated Tax****Payment
Voucher 1**

OMB No. 1545-0074

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to **"United States Treasury."** Write your social security number and "2012 Form 1040-ES" on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Calendar year-Due April 17, 2012

Amount of estimated tax you are paying
by check or
money order.

Dollars

Print or type	Your first name and initial RICHARD A	Your last name CALICE JR	Your social security number 383-86-2186
	If joint payment, complete for spouse		
	Spouse's first name and initial MELISSA J	Spouse's last name CALICE	Spouse's social security number 376-84-6196
	Address (number, street, and apt. no.) 43 WINTERBERRY COURT		
	City, state, and ZIP code. (If a foreign address, enter city, province or state, postal code, and country.) COCKEYSVILLE MD 21030		

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

DAA

Record of Estimated Tax Payments (Farmers, fishermen, and fiscal year taxpayers, see page 3 for payment due dates.)

Payment number	(a) Date	(b) Total Amount	(c) 2011 Overpayment Applied or Estimates paid	(d) Balance due	(e) Date paid	(f) Amount paid
1	04/17/12					
2	06/15/12					
3	09/17/12	29,070		29,070		
4	01/15/13	9,690		9,690		
Total		38,760		38,760		

Calculation of 1040-ES Payments

1	Taxpayer self-employment income	1	_____	
2	Spouse self-employment income	2	_____	
3	Other adjustments to adjusted gross income	3	_____	
4	Computed adjustment to adjusted gross income	4	_____	
5	Total adjustments to adjusted gross income	5	_____	
6	Computed adjustment to self-employment tax	6	_____	
7	Computed adjustment to income tax	7	_____	
8	Other adjustments to taxes/credits	8	_____	
9	Tax adjustments	9	_____	
10	Amount from Form 1040, line 61, with adjustments	10	_____	
11	Total tax	11	_____	
12	Less 2011 Federal income tax withheld	12	_____	
13	Less adjustment to withholding	13	_____	
14	Total annual payment	14	38,732	
15	Less amount of 2011 overpayment applied to 2012 estimates	15	_____	
16	Less amounts already paid towards 2012 estimates	16	_____	
17	Plus rounding amount	17	28	
18	Balance of estimates for 2012	18	38,760	

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INTERNAL REVENUE SERVICE, P.O. BOX 37007, HARTFORD, CT 06176-0007

Form

1040-ESDepartment of the Treasury
Internal Revenue Service**2012 Estimated Tax****Payment
Voucher 4**

OMB No. 1545-0074

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to "United States Treasury." Write your social security number and "2012 Form 1040-ES" on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Calendar year-Due Jan. 15, 2013

Amount of estimated tax you are paying
by check or
money order.

Dollars

9,690

Print or type	Your first name and initial RICHARD A	Your last name CALICE JR	Your social security number 383-86-2186
	If joint payment, complete for spouse		
	Spouse's first name and initial MELISSA J	Spouse's last name CALICE	Spouse's social security number 376-84-6196
	Address (number, street, and apt. no.) 43 WINTERBERRY COURT		
	City, state, and ZIP code. (If a foreign address, enter city, province or state, postal code, and country.) COCKEYSVILLE MD 21030		

For Privacy Act and Paperwork Reduction Act Notice, see instructions.